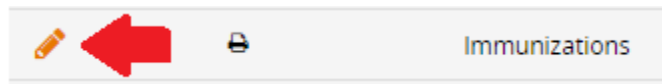# Quick Reference Guide: Welligent Attachment

FOR OFFICE VISIT ENTRY:
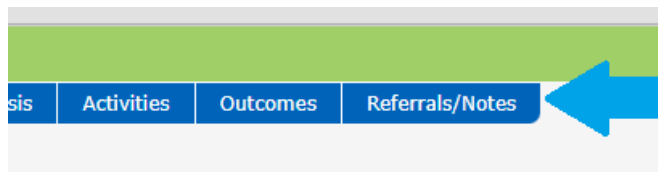
(1)   Office Visits   [Office Visits]

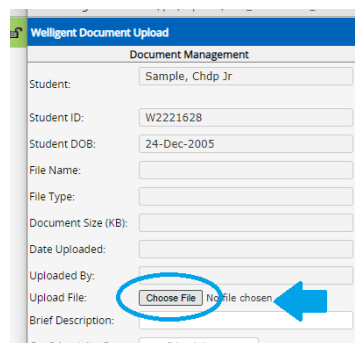(2)   Click on **Edit** if the office visit is not already open

[Edit icon]   [Print icon]   Immunizations

(3) Click on Referrals/Notes

sis | Activities | Outcomes | **Referrals/Notes**

(4) Attached Documents, click on the green plus sign

(5) Choose File

Welligent Document Upload

Document Management

Student: Sample, Chdp Jr

Student ID: W2221628

Student DOB: 24-Dec-2005

File Name:

File Type:

Document Size (KB):

Date Uploaded:

Uploaded By:

Upload File: Choose File   No file chosen

Brief Description:

(6) Access the folder where the file to be uploaded was saved

otebooks   Name   Status
ending Comp
ictures   Sample, Student   ☁
s PC

File name: Sample, Student
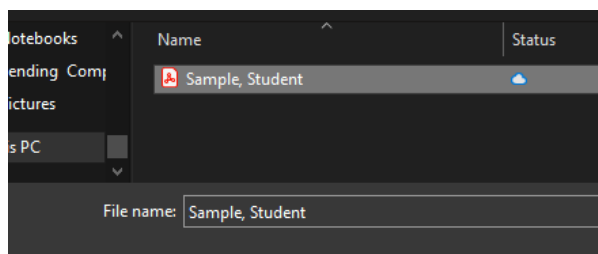
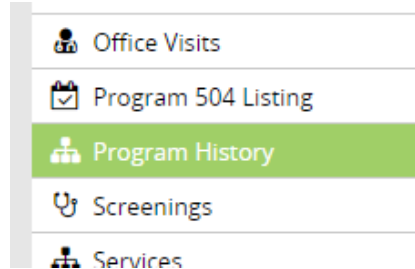(7) Enter a Brief Description i.e., if it's a doctor's note, use the date of the note and the doctor's name. *Example* **2023 Sept. 11 Dr. Sample.**
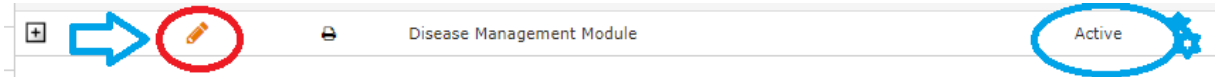

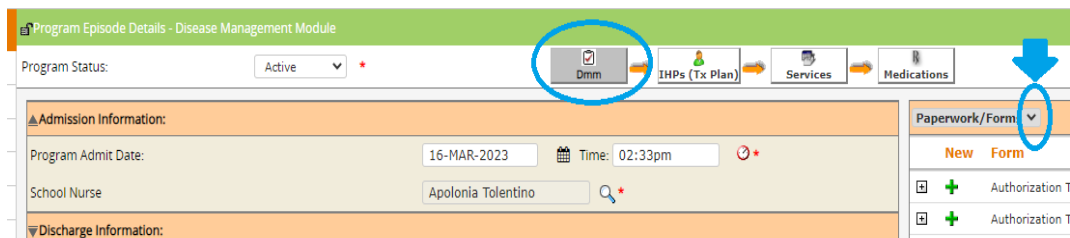(8) Click Upload

FOR MEDICATION OR PROTOCOL ORDER:

(1) Click on **Program History**
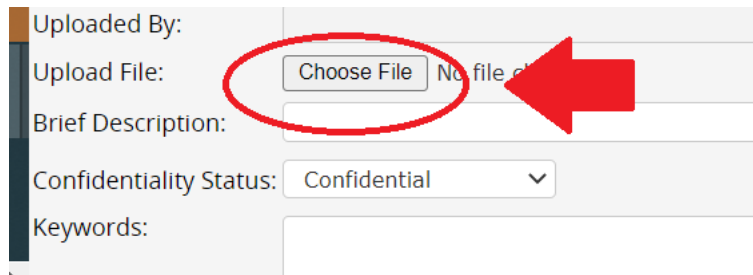

(2) Click Edit (orange pencil

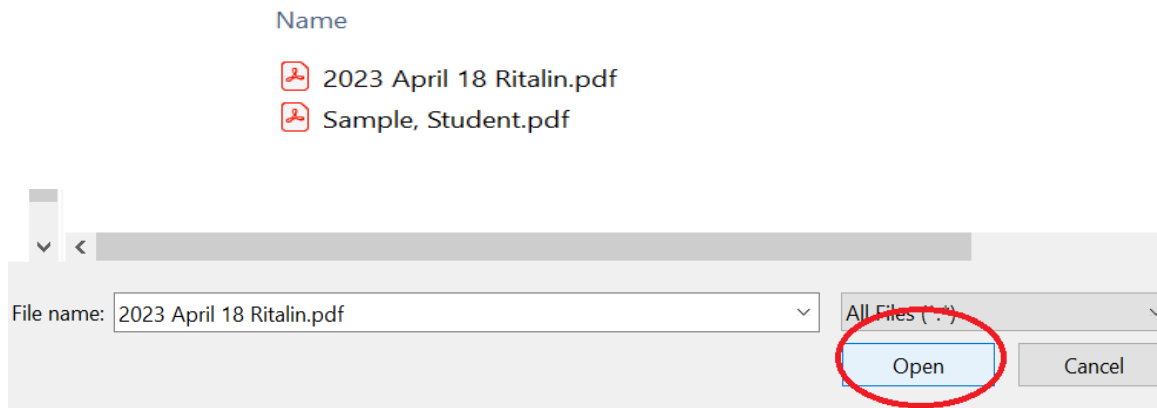(3) DMM tab view. Click on the down arrow to the right of the **Paperwork/Forms**

(4)   Select **Attachments**. Click **New Attach**

(5)   Click **Choose File**

(6)   Access the folder where the file was saved.
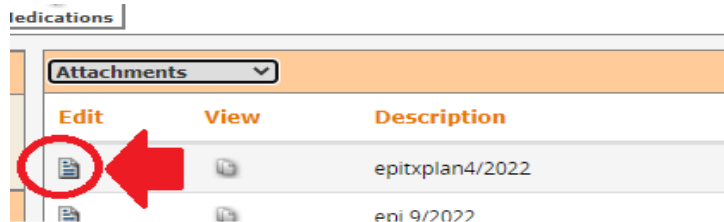

(7) Click **Upload**

ERRORS

❖ Change the **Brief Description** of the uploaded document to ERROR.

Steps to changing the Brief Description of a document that was uploaded in the wrong student record. DMM Tab > Attachments

     a. Click on the icon below **Edit** to the left of the document to be deleted

    b. Click on the arrow pointing to the right to access the **Document Management.** *The arrow is found in the upper left corner of the screen.*
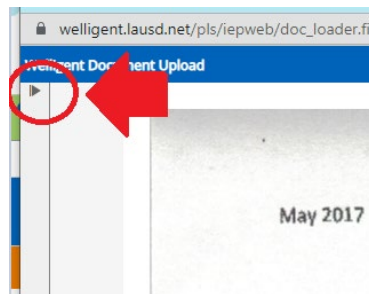
    c. Enter **ERROR** in the Brief Description text box.

d. Select **SAVE** and close screen.